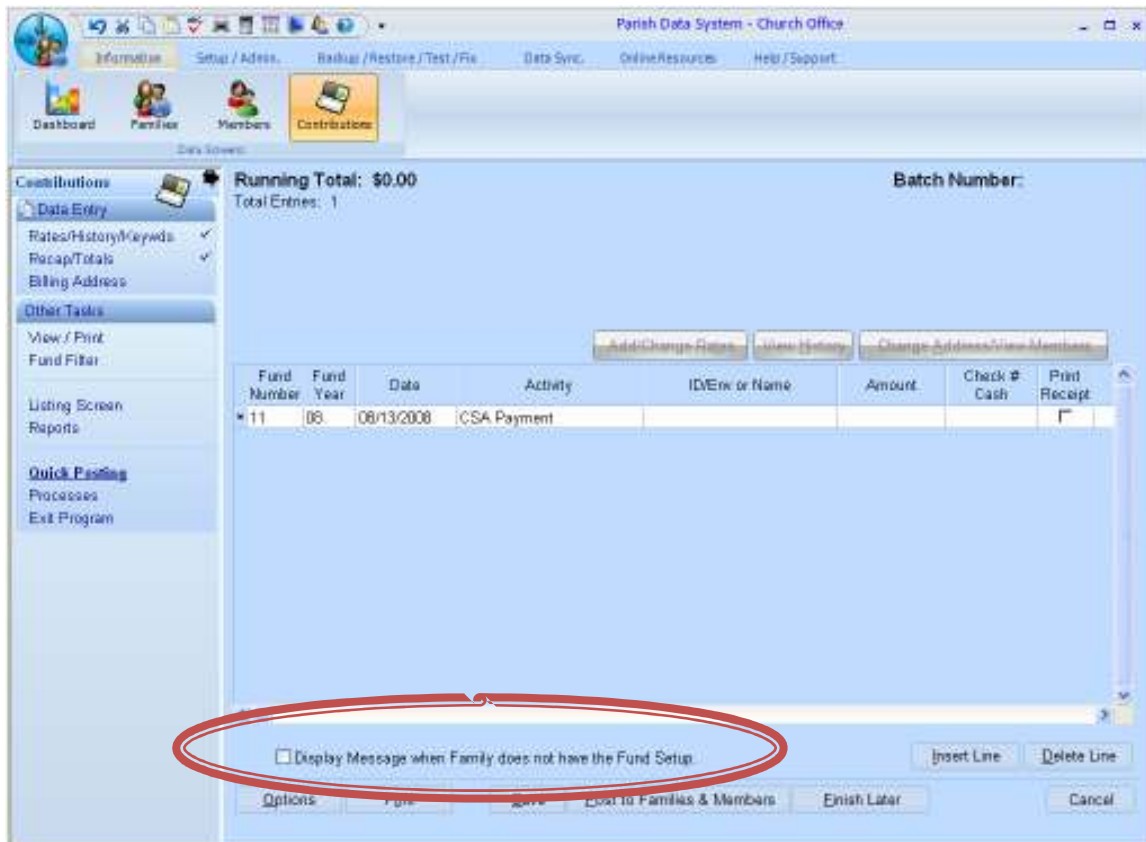


Should you open the CSA fund for everyone in your database?

If you've advanced the fund for the new year but have not opened it for everyone in your database, you can get rid of the warning that "Family does not have the Fund Setup" by doing the following:

When doing the **Quick Posting of Payments/Donations**, simply uncheck the box for "Display Message when Family does not have the Fund Setup".



What would the advantage be of opening the fund for everyone....just to avoid that error message?

Avoiding the error is one aspect, but hardly the main reason. It's easier to uncheck the box during the posting. In prior generations of the software it was more difficult to run financial reports for people who did NOT contribute. So, some folks would take the easy way and just open the fund for everyone. This creates the inverse problem – now you have to use additional selections to remove folks who did not contribute who normally wouldn't have printed in the first place. There is now another checkbox that is used with reports if you really need to print people who are not part of a fund (in a financial report). See the picture below.

Are there any disadvantages of opening a fund for someone who never gives again....do you have to do something special to reports to hide them?

Yes, if the fund is opened but someone never contributes to it, they will print in financial reports with \$0.00 totals, so you have to use a selection like Fund Totals grand Total Paid is greater than \$0.00 which is just extra work.

Why is there an error message or warning at all?

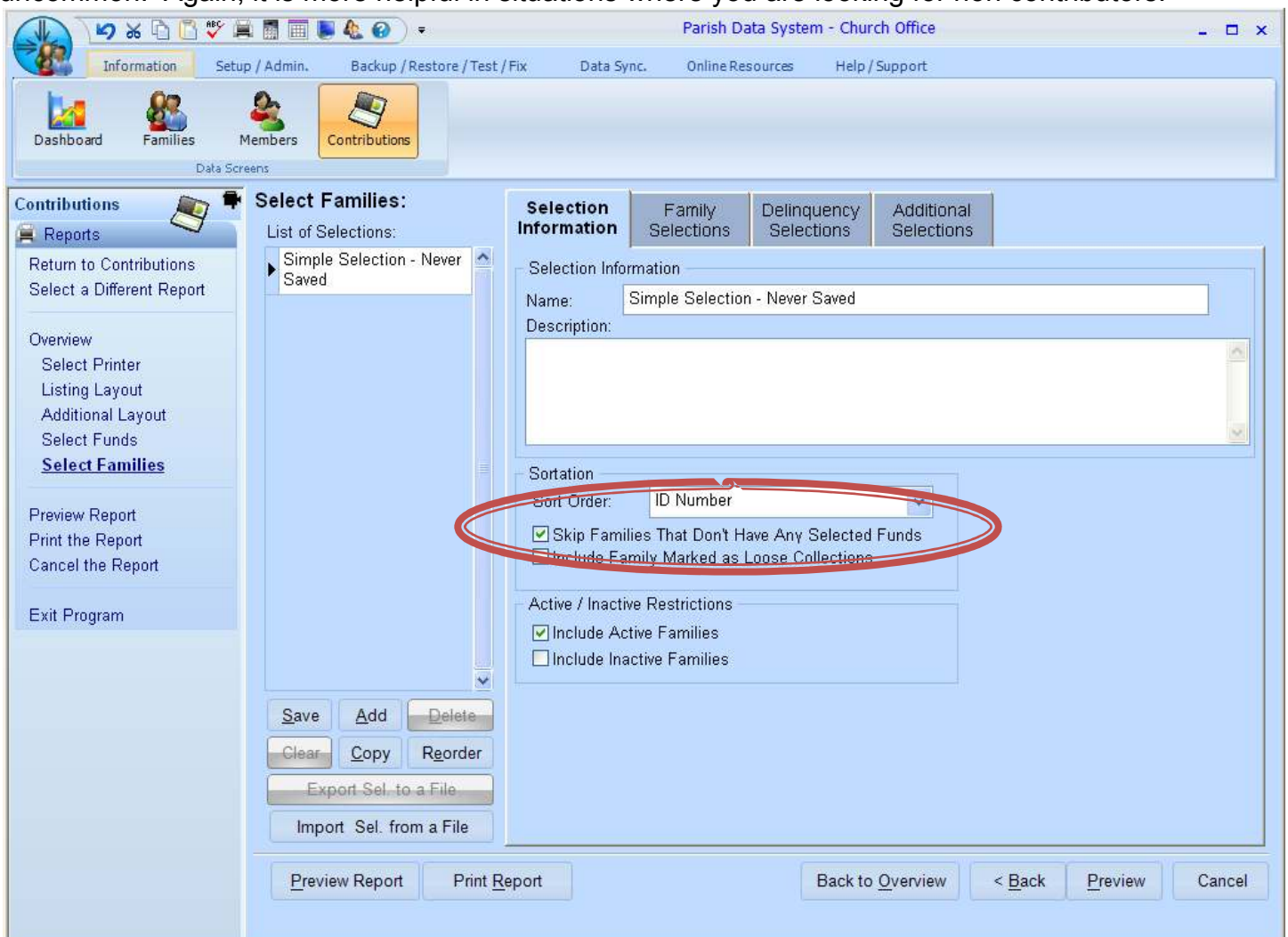
Historically, at some point in the year, most of the people who are going to make a contribution have already done so. So, if you get a warning after that point in time, you might want to double check that you've typed in the right family name or ID. It is frustrating to get the warning message during the first few batches of the year (over and over...) so we added the checkbox enabling the user to control whether the warning is displayed.

What do you do if you've already opened the fund for everyone in your parish?

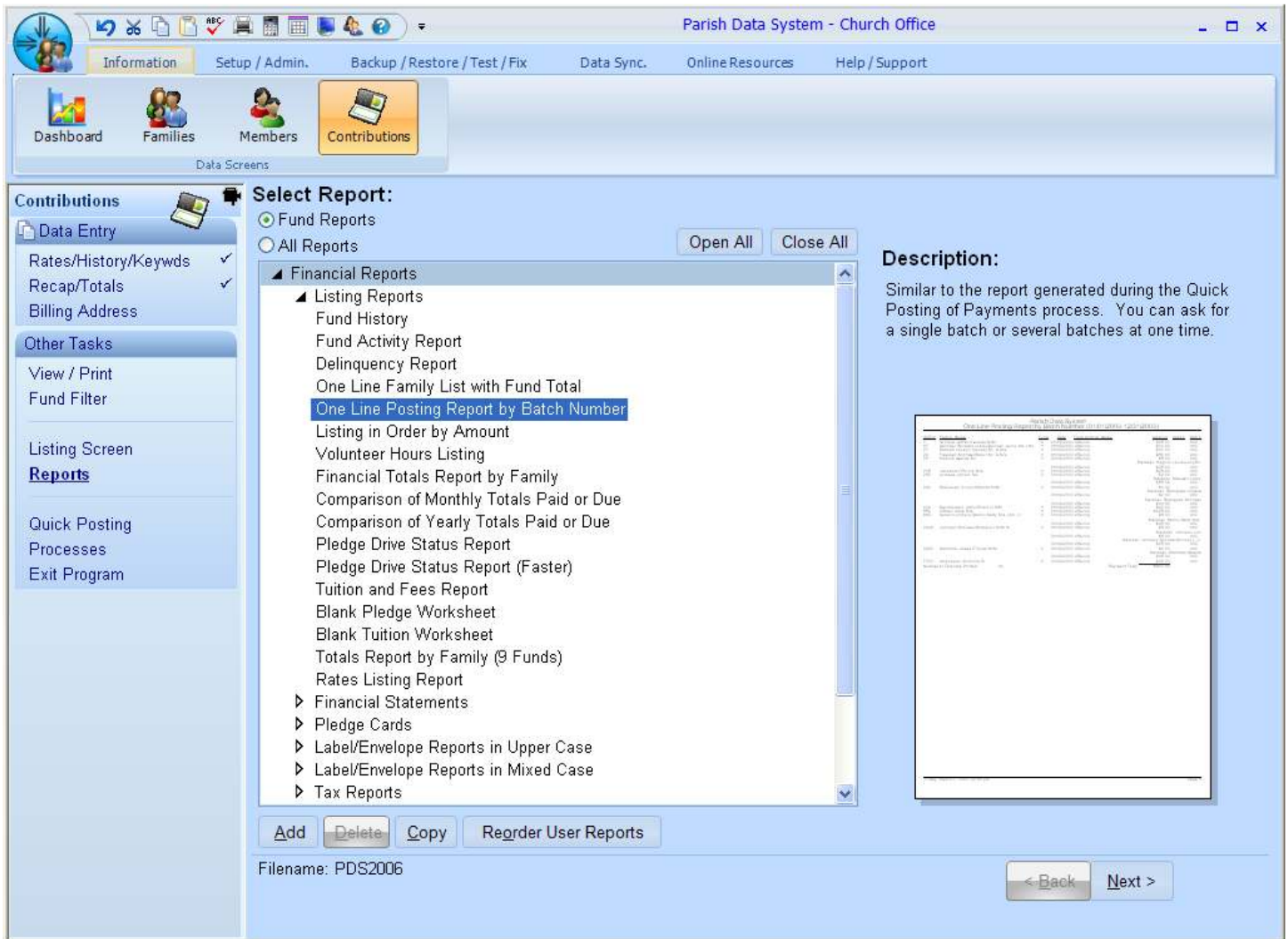
Is there a way to stop the error message and just open the fund when they post a payment?

Uncheck the box – see above. This will assume that the correct family was selected and automatically open the fund before posting the history entry.

If you only open funds as they are used, then you can easily filter out folks who didn't contribute by leaving the "Skip Families That Don't Have Any Selected Funds" box checked. This is the default. Uncheck this box to include families in a financial report that do NOT have the fund setup. This is uncommon. Again, it is more helpful in situations where you are looking for non contributors.



The screenshot displays the 'Parish Data System - Church Office' interface. The main window is titled 'Select Families:'. On the left, there is a 'Contributions' sidebar with a 'Reports' section containing options like 'Return to Contributions', 'Select a Different Report', 'Overview', 'Select Printer', 'Listing Layout', 'Additional Layout', 'Select Funds', 'Select Families', 'Preview Report', 'Print the Report', 'Cancel the Report', and 'Exit Program'. The 'Select Families' section shows a 'List of Selections:' with one entry: 'Simple Selection - Never Saved'. Below this list are buttons for 'Save', 'Add', 'Delete', 'Clear', 'Copy', 'Reorder', 'Export Sel. to a File', and 'Import Sel. from a File'. The main configuration area on the right has tabs for 'Selection Information', 'Family Selections', 'Delinquency Selections', and 'Additional Selections'. The 'Selection Information' tab is active, showing fields for 'Name:' (Simple Selection - Never Saved) and 'Description:'. Below these are 'Sortation' options: 'Sort Order:' (ID Number), a checked checkbox for 'Skip Families That Don't Have Any Selected Funds', and an unchecked checkbox for 'Include Family Marked as Loose Collections'. Under 'Active / Inactive Restrictions', there is a checked checkbox for 'Include Active Families' and an unchecked checkbox for 'Include Inactive Families'. At the bottom of the window are buttons for 'Preview Report', 'Print Report', 'Back to Overview', '< Back', 'Preview', and 'Cancel'. A red circle highlights the 'Skip Families That Don't Have Any Selected Funds' checkbox.



Enter the date range (usually a single date) and funds as you would for any other report. On the last step you can enter for “Batch Selection”:

- Nothing – all batches for the selected date will print
- A single number (like 61 below) – just that batch will print – this can optimize the process so it runs faster.
- Multiple batches separated by commas – all selected batches will be included
- A range of batches separated by a colon – all batches including the boundaries identified will be included.

